

300 Series

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Community Services Policy Manual	SUBJECT Allocations and Plan Instructions: COMMUNITY SERVICES BLOCK GRANT		EFFECTIVE DATE 10/01/07 END DATE 09/30/08 ISSUE DATE 08/01/07

REFERENCES

- The CSBG Act, P.L. 97-35 of 1981, as amended by the Coats Human Services Reauthorization Act of 1998.
- CSPM Item 402.1 – Program Accounts & Cost Categories for CSBG

PURPOSE:

This item provides guidelines and instructions for preparation and submittal of the FY2008 CSBG Community Action Plan (CAP).

BACKGROUND:

The FY2008 CSBG Planning Guidelines and planning (estimated) allocations are based on the State's FY2007 CSBG funding level of \$23,174,917. For initial planning purposes, \$20,857,425 will be available in CAA 90% formula funds for distribution for the period October 1, 2007 through September 30, 2008.

Note: Unexpended FY2007 CSBG 90% formula funds are not to be included in the initial CAP expenditure plan. As indicated in CSPM Item 507 – Unexpended Funds – Carry-Forward Policy, after DHS/Bureau of CAEO completes final closeout activities for the fiscal year, agencies will be notified concerning: 1) The carry-forward amounts for each agency and 2) The plan amendment process.

In addition to the 90% formula funds, CAAs will receive allocations from the following sources:

1. FY2008 CSBG Discretionary Funds to Meet the Minimum Funding Level: Discretionary funds will be distributed to bring agencies up to the minimum \$150,000 funding level.
2. FY2008 CSBG Discretionary Funds Set Aside for T/TA Allocations: Discretionary funds will be distributed for Training & Technical Assistance activities. Each CAA is receiving an allocation of \$3,000 specifically for "T/TA activities."

Note: Any CSBG-D T/TA funds not spent by the agency will lapse back to the state for future discretionary activities.

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POLICY:

CAAs shall prepare and submit a FY2008 CSBG CAP in accordance with the enclosed Planning Guidelines. Plans must be submitted (post marked) by Tuesday, September 4, 2007.

SUBMITTAL INSTRUCTIONS

1. **Mail** three copies of the CAP documents (except for the expenditure plan) to:

Department of Human Services
Bureau of Community Action and Economic Opportunity
 235 S. Grand Avenue, Suite 1314
 PO Box 30037
 Lansing, MI 48906

2. **Send, via Email**, your completed CSBG Expenditure Plan, DHS-684 (Rev 08/07), to your grant manager. Note: A paper copy need not be submitted.

INQUIRIES:

Questions regarding the Planning Guidelines should be directed to your grant manager. The main number for the Bureau of CAEO is (517) 373-8896.

Enclosures:

- CAP PART I: FY2008 CSBG Planning Guidelines for the CAA Community Action Plan
- CAP PART II: FY2008 CSBG Planning Guidelines for the CAA ROMA Plan

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REFERENCES

- The CSBG Act, P.L. 97-35 of 1981, as amended by the Coats Human Services Reauthorization Act of 1998.
- CSPM Item 402.1 – Program Accounts & Cost Categories for CSBG
- FY2007 ROMA Planning Instructions

PURPOSE:

To provide guidelines and instructions to CAA's for submitting requests for Community Services Block Grant (CSBG) Discretionary funds.

BACKGROUND:

CSBG Discretionary funds are available to CAA's to fund innovative projects that are designed to eliminate poverty, promote self-sufficiency and promote community revitalization in the CAA's service area. The Bureau of Community Action and Economic Opportunity (BCAEO) is particularly interested in projects that use CSBG funds:

- As seed money to bring in other funds, or
- For pilot projects that have the potential of being copied by other agencies.

Note: Discretionary funds awarded specifically to serve the Migrant population, for emergency services and/or to support self-sufficiency activities, are funded under a separate process - See CSPM Item 303 Application Instructions CSBG-Migrant Funds.

POLICY:

Allowable Activities

Allowable activities include those that demonstrate a measurable impact on causes of poverty in the agency's service community. Activities must fall within one or more of the following CSBG designated program areas: Employment, Education, Income Management, Housing, Emergency Services, Nutrition, Linkages with Other Programs, Self-Sufficiency and Health.

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Unallowable Activities

Unallowable activities include:

- The purchase or improvement of land, or the purchase, construction, or permanent improvement of any building or other facility.
- Any partisan or nonpartisan political activity or any political activity associated with a candidate, or contending faction or group, in an election for public or party office.
- Any activity to provide voters and prospective voters with transportation to the polls or to provide any similar assistance in connection with any such election.
- Any voter registration activity.
- The purchase of equipment having a unit cost of \$5,000 or more.

Agencies Eligible for Funds

To ensure an equitable distribution of funding, any agency that received CSBG-D contract funds on or after October 1, 2005 will not be eligible to receive funding for a discretionary project in FY07.

Exceptions: Agencies that received funds exclusively to provide services to Migrants and Seasonal Farmworkers (in response to the Bureau RFP process) or that received funds for specific T/TA activities (as result of the monitoring report process and at the initiation of the Bureau) are exempt from the above limitation.

Funding CAP of \$20,000:

There is a \$20,000 funding cap on discretionary projects for FY07. This limit is per agency, meaning that the total amount of CSBG-D funding an individual agency may apply for may not exceed \$20,000, regardless of the number of projects.

Cash Match:

The funding requirement is 80/20, with 80% of the overall project budget coming from CSBG-D funds and 20% (minimum is 20% of the total budget) coming from match funds as identified by the agency. The match requirement is for cash funds, not in-kind resources. There are no restrictions on the type of funding source (except for regular CSBG funding) that can generate the match funds. However, the funds used for "match" cannot have been used as a "match" for another fund source/ program.

Administrative Costs Limit of 15%

Administrative costs are limited to 15% of the total "CSBG" Budget – maximum of \$3,000. (Administrative costs include costs associated with administering and managing central agency staff and centralized functions of the agency as well as prorated costs of the single agency audit).

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Client Service Eligibility

Eligibility for direct services to clients, or for recipients benefiting from the project activities, must be based on 125 percent of the poverty income guidelines published by the U.S. Department of Health and Human Services (see CSPM Items 208 and 502 for current guidelines). This applies to that portion of the project being funded with CSBG funds. If, for example, a project is 60 percent funded by CSBG, at least 60 percent of the services or benefits must go to persons at or below 125 percent of poverty.

APPLICATION PROCESS – Step 1:

Concept Paper – Plan Synopsis

To apply for CSBG Discretionary funds, a CAA must first submit a concept paper. The concept paper should include the following: (Complete Attachment I):

- A. Need being addressed.
- B. Service area and special characteristics of the population to be served (for “direct” services, clients must meet the 125% of poverty income guidelines).
- C. Proposed project period.
- D. Activities planned and the main objectives of the project.
- E. Describe how the project eliminates a cause of poverty, promotes self-sufficiency and/or promotes community revitalization.
- F. Names of any collaborating agencies.
- G. If this activity/project is expected to be a continuing project, how will the activity be funded in the future?
- H. Source of matching funds.
- I. Proposed budget and Matching Funds: Provide a brief description of the amount and type of costs expected. Also, complete and submit the “CSBG-D and Matching Share Line Item Budget.” (See Attachment II)
- J. Identify the amount of Regular CSBG funds carried forward into FY2006 and into FY2007. If funds carried into FY2007 were \$50,000 or more, explain why these funds cannot be used for the proposed project.

For planning purposes, please note: agencies will be notified of funding decisions by June 15, 2007. Therefore, in planning your project timelines, please allow sufficient time for contract execution between funding notification and your project start date. Agencies should not anticipate a contract start date prior to July 16, 2007 – the end date will vary according to the project timelines but should be no later than 12 months after your contract begin date.

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Concept Paper Due Date

Concept papers must be submitted not later than Friday, May 25, 2007. Send the concept paper and attachments to the Agency's grant manager, electronically, to the following E-mail address:

Jean Luttig
Dianne Morales
Mike Rodriguez
Jim Turner

Email: luttigj@michigan.gov
 Email: moralesd@michigan.gov
 Email: rodriguez3@michigan.gov
 Email: turnerj@michigan.gov

Note:

- Agencies will be notified of funding decisions by June 15, 2007. In planning your project request, please allow sufficient time for contract execution between funding notification and your project start date. Agencies should not anticipate a contract start date prior to July 16, 2007 – the end date will vary according to your project timelines, but should be no later than 12 months after your begin date.

BCAEO Review of Concept Papers

Requests will be reviewed by BCAEO and the agency will receive written notification of the approval or disapproval of the concept paper/request by June 15, 2007. Approval will be dependent upon the project meeting the intended use of CSBG funds, funding availability, as well as the following. Note: Funds will be awarded through the contract process.

- The overall quality of the project
 - Does this project have innovative qualities?
 - Does this project eliminate a cause of poverty, promote self-sufficiency or promote community revitalization?
 - Is the implementation well thought out and are the steps clearly defined in the concept paper? (Activities planned and main objective.)
 - If applicable, what is the agency's ability to continue the project after the CSBG-D funds expire?
 - Does this project have the potential of being copied by other agencies?
 - Does this project have the potential of bringing other resources into the agency?
- CSBG Prior Year Carry Forward
 - Does the agency consistently carry forward a significant amount (\$50,000+) of regular CSBG funds and if so, are there carry-forward funds that could be used in lieu of CSBG-D funds to support the project request?
- Match Requirement
 - Does the agency meet the 80/20 match requirement as outlined above?

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Approved Concept Papers

DHS grant managers will notify agencies of the funding decisions by June 15, 2007. All agencies with approved concept papers must submit their formal application (See Step 2).

APPLICATION PROCESS – Step 2

Formal Contract Application:

Agencies with approved concept papers must submit a formal application to commence the contract process. Applications must be submitted in a timely manner and with a projected contract begin date of not later than September 24, 2007. (Actual project activities may begin later than September 24, but the formal contracting process should be near completion by September 24, 2007.). An electronic copy of the application documents will be forwarded to agencies by the DHS grant manager.

The following elements must be included in the application:

1. **Transmittal Letter** from the CAA Executive Director indicating that the board has reviewed and approved the application.
2. **Agency Information Sheet** – Complete Attachment A-1, Electronic Application
3. **Work Statement** – Complete Attachment A-2, Electronic Application

A. Program Description

- Describe all proposed activities and services that will be supported in whole or in part by this application. Include the method of delivery and the anticipated results for each activity or service.
- Identify the service area and include the address (county, street and city) for each service site (or administrative office if applicable).
- Describe any other activities conducted by your agency that **are not supported by this application** but are specifically connected as part of the overall scope of the project.

B. Coordination and Collaboration

Describe any planned coordination and collaboration activities expected to occur that are essential for a successful project. Indicate other agencies or groups that will be involved and how they will participate.

C. Consultants or Subcontractors

If the agency plans to contract with another entity as a consultant or to provide specific services for clients, the agency must identify both the service and the contractor's name in the Program Description section of the narrative. A copy of the proposed contractual agreement must be included as part of the formal application. Note: See CSPM Item 402.1 - CSBG Allowable and Unallowable Costs for specific requirements with regard to Consultants or Subcontractors.

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4. ROMA PLAN

Submit, at a minimum, one Performance Target Outline (PTO) for the funded project. Note: Refer to the FY07 CAP Part II - ROMA planning materials, dated August 2006, for the appropriate PTO forms. (Electronic copies of all PTO forms are available.)

5. Contract Budget

- Submit a completed CSBG Contract Budget, CM-468-CSBG-D.exl (05/2007) for the CSBG project funds. See CSPM Item 402.1 – CSBG Allowable and Unallowable Costs.
- Submit a CSBG-D and Matching Funds Line Item Budget (see Attachment II).

Submittal Process:

The application must be submitted to the agency's grant manager electronically by E-mail. See the E-mail addresses noted above. A signed copy of the transmittal letter may be submitted electronically, by fax or by mail.

Contract Process:

Agencies should plan for a minimum of 30 – 60 days between submission of the full application and the starting date of the contract. Once the application has been approved, the DHS grant manager will forward a contract to the agency for signature and return. Agencies should not incur expenditures until the contract has been signed by DHS.

Attachments:

Attachment I: Concept Paper – Plan Synopsis
Attachment II: CSBG-D and Matching Share Line Item Budget
A-1 and A-2: CSBG-D Application

Not Attached:

CSBG-D Electronic Budget, CM-468-CSBG-D.xls (Revised 05-2007)

Note: All forms can be obtained by contacting your agency's grant manager.

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REFERENCES:

- CSBG Act, P.L. 97-35 of 1981, as amended by the Coats Human Services Reauthorization Act of 1998.
- CSPM Item 208 – Poverty Guidelines

POLICY:

OVERVIEW

Community Services Block Grant (CSBG) funds are available to enhance CSBG services to migrant or seasonal farm workers who meet CSBG income requirements.

Agencies may apply for CSBG-M funds to address emergency needs of their migrant and seasonal worker population or to support self-sufficiency activities for these groups (e.g., ESL – English As A Second Language).

A migrant is a person who:

- Works or seeks work in agriculture or a related seasonal industry; and
- Moves away from his/her usual home to a temporary residence as a condition of employment or because the distance from his/her usual home is greater than 50 miles.

A seasonal farm worker is a person who:

- Works in agriculture or a related seasonal industry; and,
- Is not required to be absent overnight from his/her permanent place of residence.

Allowable Services

Allowable CSBG services and assistance to income eligible migrant or seasonal farm worker individuals and their families include, but are not limited to the following:

- Assistance in securing and retaining employment
- Necessary and appropriate educational services
- Financial Counseling
- Health services

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- Food
- Housing
- Transportation
- Other assistance to meet immediate and urgent individual or family needs which block the achievement of self-sufficiency

Unallowable activities include:

- The purchase or improvement of land, or the purchase, construction, or permanent improvement of any building or other facility.
- Any partisan or nonpartisan political activity or any political activity associated with a candidate, or contending faction or group, in an election for public or party office.
- Any activity to provide voters and prospective voters with transportation to the polls or to provide any similar assistance in connection with any such election.
- Any voter registration activity.
- The purchase of equipment having a unit cost of \$5,000 or more.

Income Eligibility Guidelines

Recipients of services must meet CSBG income requirements, have income at or below 125% of federal poverty guidelines, as identified in CSPM Item 208 – Poverty Guidelines.

Amount of Funding/Contract Period

Agencies may apply for up to \$15,000 for a one year funding period with the contract period beginning May 1, 2007 and ending April 30, 2008. Administrative costs are limited to 15% of the total budget. (Administrative costs include costs associated with administering and managing central agency staff and centralized functions of the agency as well as prorated costs of the single agency audit.)

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REPORTING REQUIREMENTS

1. The DHS-1070, Statement of Expenditures, must be submitted monthly to report expenditures, and to trigger reimbursement payments. These reports are due within 30 calendar days of the end of each month.

Agencies will be reimbursed for monthly reported expenditures, less a proportional share of any advance. The proportion of any advance to be recovered will be equal to the percent of the month's billed expenditures of the total contract amount.

2. Programmatic Narrative Reports (DHS-129), which reflect the effectiveness of activities performed under the grant, must be submitted quarterly.

PAYMENT PROCESS

Payments will be made upon receipt of monthly expenditure reports to DHS.

APPLICATION SUBMISSION AND DUE DATE

Submit the following materials electronically to your grant manger no later than Wednesday, March 21, 2007.

- The application package, Attachment A
- A completed ROMA Performance Target Outline
- Copy of the electronic budget

ATTACHMENT A

The following documents have been emailed to my grant manager.

(Ck as applicable)

_____ Application Form, Attachment A

_____ ROMA Goal(s) page(s)

_____ Electronic budget

_____ Subcontracting/Proposed Contract Format

APPLICATION FORM

1. APPLICANT AGENCY:

2. AGENCY ADDRESS:

3. APPLICATION CONTACT PERSON & TITLE:

4. CONTACT PERSON PHONE:

5. CONTACT PERSON FAX:

6. CONTACT PERSON EMAIL ADDRESS:

7. DESCRIBE EXPERIENCE STAFF HAVE IN WORKING WITH THE MIGRANT POPULATION INCLUDING WHETHER SUCH STAFF ARE BILINGUAL:

8. AMOUNT REQUESTED:

(\$15,000 is the maximum amount that can be requested.)

9. GEOGRAPHICAL AREA TO BE SERVED:

10. LOCATION OF FACILITIES/WHERE ACTIVITIES WILL BE CONDUCTED:

11. STATEMENT OF WORK/DESCRIBE THE SERVICE(S) YOU WILL BE PROVIDING:

If your proposed migrant program has more than one component, please describe each component separately using the following format...

A. Describe the service to be provided:

- Number of families you plan to serve:
- Number of individuals you plan to serve:

B. Describe the service to be provided:

- Number of families you plan to serve:
- Number of individuals you plan to serve:

C. Describe the service to be provided:

- Number of families you plan to serve:
- Number of individuals you plan to serve:

D. Describe the service to be provided:

- Number of families you plan to serve:
- Number of individuals you plan to serve:

12. LIST THE STRATEGIES YOU WILL USE TO IDENTIFY AND RECRUIT CLIENTS TO YOUR SERVICE(S):

13. ADMINISTRATIVE COSTS ARE LIMITED TO 15%. WHAT PERCENT OF YOUR TOTAL BUDGET IS FOR ADMINISTRATION? (See definition of Administrative costs)

14. DESCRIBE YOUR AGENCY'S COORDINATION EFFORTS WITH LOCAL DHS OFFICES, SPANISH SPEAKING ORGANIZATIONS AND OTHER MIGRANT SERVICE PROVIDERS:

15. **ATTACHMENT:** IF YOU PLAN TO SUB-CONTRACT FOR SERVICES, ATTACH A COPY OF THE PROPOSED CONTRACT FORMAT. A DESCRIPTION OF THE SERVICES TO BE PROVIDED AND THE COST TO THE AGENCY MUST BE INCLUDED.

16. **ATTACHMENT:** SUBMIT A MINIMUM OF ONE ROMA GOAL FOR YOUR PROGRAM.

17. **ATTACHMENT:** SUBMIT BUDGET ON FORM CM-468-CSBG-D ELECTRONIC BUDGET.

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ISSUANCES AFFECTED: A. REFERENCES- None

B. RESCISSIONS- None

BACKGROUND: The Department of Human Services is allocating DOE funds, based on Department of Energy Weatherization Program Notice information. Any available carryover funds will also being distributed to all eligible LWOs upon DOE approval.

POLICY: Local Weatherization Operators (LWOs) are to prepare and submit the Weatherization Assistance Program (WAP) Local Service Plan in accordance with the attached directions.

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REQUEST FOR SERVICE PLAN
MICHIGAN DOE WEATHERIZATION ASSISTANCE PROGRAM PLANNING INSTRUCTIONS

I. SUBMISSION OF PLAN

A. The plan must include the following in order:

1. Signed Weatherization Agreement
2. Summary Narrative – Use form DHS-
3. Mandatory plan attachments include:
 - Landlord Contribution Policy
 - Agency WAP Appeals Policy
 - Walk-away and/or Deferral Policy(ies)
 - Negotiated Price Lists
 - Current POI premium notice
 - Agency Organizational Chart reflecting all positions budgeted to the Weatherization program
4. DOE Electronic Budget (CM-468-DOE)
5. Weatherization Unit Production Schedule and County Unit Production Schedule
6. Goals Summary

B. LWOs are to submit the Local Service Plan electronically to the assigned BCAEO grant manager.

The Local Service Plan should be emailed by **March 23, 2007**

II. ALLOCATION - FUNDS

Attachment A-1 shows DOE WAP individual local agency allocations. Funding is based upon the availability of federal resources.

DOE continues to advise they expect 100% production and 100% expenditure of all funds. In response, the PY07 state plan indicates that DHS retains the right to adjust the contract amount for LWOs not meeting production and expenditure projections. To ensure we meet these expectations, we will regularly review production and expenditures using the Statement of Expenditures and Programmatic reports submitted. For PY07, DHS staff will survey local agencies in the first half of the program year to ascertain whether or not each agency can

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meet the projected production. Any agency not expecting to spend funds or not meeting the projected production as indicated on the Production Schedule submitted with their PY07 plan, will be contacted to discuss their allocation. Redistribution of funds will occur with input from LWOs and approval of amended plans.

Note: The redistribution of any funds will include a proportionate amount of administrative funds.

III. PROGRAM PERIOD

LWOs are to plan budgets for the period April 1, 2007 through March 31, 2008. |

IV. EXPENDITURE RATE/ALLOWABLE EXPENDITURES

LWOs will develop plans using the expenditure and program guidelines in this package.

DOE will again allow states to permit LWOs, whose DOE allocation is less than \$350,000, to use up to an additional 5 percent of funds for administrative costs. The allocation chart (Attachment A-1) includes the full additional 5 percent administrative allocation for applicable agencies. The additional administrative allocation can only be budgeted as follows:

1. To pay for essential equipment and/or services that can be demonstrated to directly enhance the accountability and performance effectiveness of the agency's weatherization program. The eligible equipment and/or services would be a part of the agency's central administrative structure and would either fully or partially be directly utilized for the agency's weatherization program.
2. For salaries and fringe benefits for agency administrative employees that work fully or partially for the provision of agency weatherization program services. An agency's weatherization coordinator's salary/fringes can be charged to this category for the time that he/she spends in administrative activities associated with the weatherization program. Any salaries/fringes charged to this category must be reconciled and supported by the agency's overall cost allocation plan.
3. For indirect costs as long as they are at an approved indirect cost rate.

If the agency does not require the full 5 percent of supplemental administrative funds, any balance must be added to the agency's "program" allocation with appropriate budget and production support adjustments.

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Agencies will be allowed to budget up to \$2,885 per unit average maximum for support/labor/materials costs. However, agencies should not automatically budget up to the \$2,885 per unit average cost level but should prepare the budget based on actual past experience and program needs.

Note: Any available carryover funds are distributed as follows: 5% in Admin and the remainder in Program funds.

Allowable Training and Technical Assistance (T/TA) expenditures include:

1. Cost of printing client education materials;
2. Cost of tuition and related charges for staff computer skills training directly related to weatherization program automation activities;
3. Expenses for staff attending appropriate State or DOE-sponsored weatherization training; including any mandatory training as determined by the State;
4. Expenses for staff attendance at Michigan Regional Weatherization Coordinator meetings;
5. Expenses for staff or contractors attendance at the DOE and/or Affordable Comfort Conference;
6. Purchase of computer hardware/software for the operation of weatherization program;
7. Equipment leases or maintenance costs or services that directly contribute to the overall effectiveness and efficiency of the agency's weatherization program (this must be justified in the agency plan);
8. Subscriptions to technical publications;
9. Salaries/fringe benefits of staff while attending an approved training activity.
10. Expenses associated with the Statewide evaluation of the weatherization program.

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V. FISCAL REPORTING

Expenditure Reports: The Statement of Expenditures, DHS-4326-DOE, will be used in accordance with the Community Services Policy Manual Item 401.2. Receipt and approval of the monthly report will trigger reimbursement payments (minus recoupment of a portion of the initial advance).

VI. VEHICLES

Both DHS and DOE must approve purchases prior to taking any action to purchase and/or lease vehicles. Agencies must complete the DHS-551 for all equipment purchase and/or vehicle lease requests.

VII. GOALS SUMMARY (DHS-4322)

The client goals are as follows:

125% Poverty: More than 50 percent of households weatherized must be at or below 125% of poverty.

FIP/FS/SSI/SDA: The budget bill for DHS requires that 25 percent of households weatherized be receiving family independence program, food stamps, state disability assistance, or supplemental security income.

Elderly households: LWOs may determine goal (percentage) based on data for their service area or use 20 percent.

Disabled households: LWOs may determine goal (percentage) based on data for their service area or use 15 percent.

Native Americans: LWOs should use local available data to determine number of households.

OPTIONAL PRIORITIES

By adding "High Residential Energy User" and "Households with a High Energy Burden", DOE intended to provide States and Local Agencies with two additional priority categories for their discretionary use. These categories are in no way mandatory and may be used in lieu of, or in any combination with, the existing priority categories of elderly, persons with disabilities, or FIP, FAP, SDA, SSI. By adding these categories, State and local agencies are better able to partner with utilities and other programs to leverage additional resources into their programs.

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High Residential Energy User is defined as a low-income household whose residential energy expenditures exceed that median level of residential expenditures for low-income households in the state.

Households with a High Energy Burden is defined as a low-income household with a residential energy burden (residential expenditures divided by the annual income for that household) exceeds the median level of energy burden for all low-income households in the state.

To determine the number of households in either category, LWOs can access data at:

<http://www.eia.doe.gov/emeu/recs/contents.html>

VIII. LIABILITY INSURANCE

Agencies are required to maintain sufficient liability coverage for DOE funded activities. Liability insurance must cover the DOE required lead activities. DOE requires that all contractors, contractor crews and all local agency staff who work on a home be trained in Lead Safe Work (LSW) practices. Local agencies are responsible to make sure contractors have liability insurance for lead.

Local Weatherization program managers should check the agency's insurance policies to make sure policies don't contain a clause that prohibits work in homes with lead-based paint.

Per the DOE Program Guidance, local agencies and their contractors are required to have sufficient liability insurance coverage for DOE funded activities. LWOs should review their existing liability insurance policies. It is likely that general liability insurance has a pollution occurrence exclusion. When there is a gap in the coverage due to an exclusion, the agency has insufficient insurance. Therefore, LWOs are required to have Pollution Occurrence Insurance (POI). LWOs are strongly advised to either refer or defer weatherization work that will disturb surfaces that may contain lead-based paint, until they have insurance that provides coverage for LSW work situations involving lead-based paint.

Also, local agencies that employ private contractors to perform weatherization services must ensure that each private contractor is adequately insured as well, including pollution insurance coverage.

Liability insurance, including POI, must be charged to the Liability Insurance line item in the budget.

MICHIGAN DEPARTMENT OF HUMAN SERVICES		Item 304	Page 7 of 8
Community Services Policy Manual	SUBJECT Allocations and Plan Instructions DEPARTMENT OF ENERGY (DOE) WEATHERIZATION ASSISTANCE PROGRAM (WAP)		EFFECTIVE DATE 4-01-07 END DATE 03-31-08 ISSUE DATE 03-05-07

IX. SERVICE PLAN

The Program Service Plan, Attachment B, must include the following elements:

A completed DOE WAP Service Plan. The plan includes a summary narrative which provides a description of the major aspects of the methods of program operation. Complete Sections I – VI and include all requested attachments.

Section I: Program Operations LWOs must demonstrate sufficient year-round staffing to respond to weatherization program issues in a timely matter. Identify specifically any decisions to fulfill production goals in less than 12 months and/or planned layoffs of staff for any period of time.

Note: DO NOT include the production figures reported on the Goals Summary or the amount of your agency allocation in the narrative.

Section II: Basic Service Delivery Mechanism & Program Structure

Include a summary of:

- outreach/intake system
- use of crews/private contractors
- pre/post inspection procedures
- description of blower door testing protocol
- method of installing measures
- client education plan
- T/TA plan

Section III: Agency Program Policies

Attach copies of all agency policies requested and include the date your agency's board approved each.

Section IV: Other Program Information

Answer items A – K completely. Attach all copies requested including:

- Item G: negotiated price list
- Item I: POI premium notice
- Item J: a copy of your agency organizational chart be attached. The chart must reflect all positions budgeted to the DOE WAP.

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Section V: Waiver Requests

Complete Items A – C in this section. You must include any waivers you are requesting to be continued as well as any new waivers in this section.

NOTE: Agencies planning to use adjusted fuel prices to process NEAT audits must include a completed Attachment A, NEAT Fuel Cost Worksheet, as part of the waiver list.

Section VI: Equipment Purchase Requirements

List any equipment items you are requesting to purchase. Complete and attach the DHS-551 for all equipment purchases and any vehicle purchase/lease request.

The program service plan must also include the following:

- ◆ DOE Electronic Budget—CM-468-DOE.
- ◆ Weatherization Unit Production Schedule And County Unit Production Schedule-DHS-4321 (Attachment D). For subgrantees serving more than one county, a break out of total production per county and percentage of production per county is required. NOTE: Wayne County agencies should show services to their specific service area communities.
- ◆ Goals Summary, DHS-4322 --(Attachment E).

ATTACHMENT A-1

PY07 DOE WEATHERIZATION PROGRAM ALLOCATIONS

April 1, 2007 – March 31, 2008

ATTACHMENT B

DOE Weatherization Assistance Program (WAP) Service Plan

ATTACHMENT C
NEAT Fuel Cost Worksheet

ATTACHMENT D

**WEATHERIZATION UNIT PRODUCTION SCHEDULE
AND COUNTY UNIT PRODUCTION SCHEDULE
DHS-4321**

ATTACHMENT E

**GOALS SUMMARY
DHS-4322**

MICHIGAN DEPARTMENT OF HUMAN SERVICES		Item 305	Page 1 of 3
Community Services Policy Manual	SUBJECT Allocation and Plan Instructions: PY06 LOW INCOME HOME ENERGY ASSISTANCE PROGRAM (LIHEAP)		EFFECTIVE DATE 04-01-06 END DATE ISSUE DATE 03-02-06

BACKGROUND:

The Department of Health and Human Services (HHS) has allocated LIHEAP funds to Michigan, of which \$3,000,000 has been made available to Local Weatherization Operators (LWOs) for weatherization. See the LIHEAP Allocation Chart, Attachment A.

PURPOSE:

To provide LWOs with policy guidelines and service plan instructions regarding the use of LIHEAP funds for the period from April 1, 2006 through March 31, 2007.

POLICY:

LWOs are required to administer this grant following HHS LIHEAP regulations and U.S. Department of Energy (DOE) Weatherization Assistance Program (WAP) regulations. Note: See CSPM Item 703, Program Requirements (LIHEAP)

Cost Allocation Limitations

- The maximum amount for “administration” is 5% of the agency’s LIHEAP allocation.
- The maximum amount for “support” is **20%** of the agency’s LIHEAP allocation.
- The maximum amount for “client education” is **20%** of the agency’s LIHEAP allocation.

Note: These percentage limits are established because the intended use of these funds is that they be spent for weatherization activities in combination with DOE funds to provide maximum energy conservation measures.

- Funds should be spent throughout the grant period.
- Any funds budgeted for liability insurance or training activities must be included under “administration” or “support.”
- LIHEAP funds may not be used for equipment purchases.
- See CSPM Item 402.3, Cost Categories LIHEAP, for descriptions of cost categories.

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Community Services Policy Manual	SUBJECT Allocation and Plan Instructions: PY06 LOW INCOME HOME ENERGY ASSISTANCE PROGRAM (LIHEAP)		EFFECTIVE DATE 04-01-06 END DATE ISSUE DATE 03-02-06

SERVICE PLAN INSTRUCTIONS

The following forms must be submitted to amend the Local Service Plan:

- Agency Organizational Chart reflecting all positions budgeted to LIHEAP
- A Summary Narrative describing the proposed programmatic use of LIHEAP funds.

Note: The Summary Narrative form includes a separate section for the agency's client education plan.

- Electronic Budgets

Note: The budgets include an "Client Education" category and all expenses related to the agency's client education plan should be recorded here.

- Staff Respondent form

NOTE: A package including most of these forms is attached. You do not need to incorporate these forms into your CSPM manual. The electronic budget forms can be requested from your grant manager.

REPORTING PROCESS

- * A Statement of Expenditures report (DHS-4326-LIHEAP) must be submitted each month. For the month of September, billings shall be submitted as directed by DHS to meet fiscal year-end closing deadlines and must be marked **final** on the report.
- * All reporting requirements currently applicable for DOE-WAP will be utilized for the LIHEAP grant.
- * The LIHEAP Activity Report (DHS-1073) must be completed and submitted by September 30, 2006.

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Community Services Policy Manual	SUBJECT Allocation and Plan Instructions: PY06 LOW INCOME HOME ENERGY ASSISTANCE PROGRAM (LIHEAP)		EFFECTIVE DATE 04-01-06 END DATE ISSUE DATE 03-02-06

SUBMITTAL INSTRUCTIONS

LWOs shall prepare the LIHEAP Service Plan in accordance with the instructions and policy noted above. Send, via Email, your completed plan documents and electronic budgets to your grant manager. Plans must be submitted (emailed or postmarked) by Wednesday, March 22, 2006.

INQUIRIES:

In accordance with the Americans With Disabilities Act, the information contained in this document will be made available in alternative format (large type, audiotape, etc.) upon special request.

FORMS PACKAGE

(NOTE: You do not need to incorporate this form package into your CSPM Manual. These forms are in Item 202 in the CSPM.)

ATTACHMENT A

ALLOCATION CHART

ATTACHMENT B

Summary Narrative- LIHEAP Plan

Part A: Weatherization Activities:

Part B: Client Education Activities:

ATTACHMENT C

Staff Respondents

STAFF RESPONDENTS

Department of Human Services

AUTHORITY : P.A. 230 of 1981
COMPLETION: MANDATORY
PENALTY : NO FUNDS RELEASED

THE MICHIGAN DEPARTMENT OF HUMAN SERVICES WILL NOT DISCRIMINATE AGAINST ANY INDIVIDUAL OR GROUP BECAUSE OF RACE, SEX, RELIGION, AGE, NATIONAL ORIGIN, COLOR, WEIGHT, HEIGHT, MARITAL STATUS, DISABILITY OR POLITICAL BELIEFS.

TO ASSIST STATE STAFF IN EXPEDITING THE PROCESSING OF THIS PLAN, PLEASE IDENTIFY AGENCY REPRESENTATIVES WHO CAN ANSWER SUBSTANTIVE AND TECHNICAL QUESTIONS ABOUT THE PLAN. CONTACT WILL BE MADE WITH THE IDENTIFIED INDIVIDUALS VIA TELEPHONE OR IN PERSON TO OBTAIN CLARIFICATION OR TO REQUEST ADDITIONAL INFORMATION.

NOTE: Respondent #1 should be the main contact regarding this plan. The agency is encouraged to identify the agency planner or program manager if this is appropriate (Rather than the executive director).

Respondent #1

Name: _____

Title: _____ Phone No. _____

Respondent #2

Name: _____

Title: _____ Phone No. _____

Respondent #3

Name: _____

Title: _____ Phone No. _____

Respondent #4

Name: _____

Title: _____ Phone No. _____

DHS-1065 (02/05)

MICHIGAN DEPARTMENT OF HUMAN SERVICES		Item 307	Page 1 of 5
Community Services Policy Manual	SUBJECT Allocation and Program Requirements TEMPORARY ASSISTANCE FOR NEEDY FAMILIES FUNDS		EFFECTIVE DATE 10-01-07 ISSUE DATE 11-16-07

PURPOSE:

To provide CAAs with instructions regarding administration of the Temporary Assistance for Needy Families (TANF) funds.

BACKGROUND:

\$2.35 million in federal TANF funds are available to CAAs to enable them to:

- provide assistance to needy families so that children may be cared for in their own homes or in the homes of relatives,
- end dependence of needy parents on government benefits by promoting job preparation, work and marriage,
- prevent and reduce the incidence of out-of-wedlock pregnancies, and
- encourage the formation and maintenance of two-parent families.

POLICY:

Funding Period

The funding period will be October 1 through September 30. All unexpended funds will lapse at the end of the funding period.

Allocation of Funds

Funds are allocated using a base of \$4200, with the balance based on the CAA's relative percentage of persons in the state below 125% of poverty. CAA allocations are shown in the TANF Allocation Chart at the end of this item.

Agreement Instructions

The TANF Agreement must be signed by the person having lawful authority to bind the Grantee to the terms. The signature must be witnessed. Return both originals of the signed, dated and witnessed Agreement to your grant manager at:

Bureau of Community Action and Economic Opportunity
 Department of Human Services
 P.O. Box 30037
 Grand Tower, Suite 1314
 Lansing, MI 48909

The TANF Agreement, in conjunction with the Master Agreement, will constitute the full contractual agreement between DHS and the CAA for the administration of the TANF funds.

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Community Services Policy Manual	SUBJECT Allocation and Program Requirements TEMPORARY ASSISTANCE FOR NEEDY FAMILIES FUNDS		EFFECTIVE DATE 10-01-07 ISSUE DATE 11-16-07

Eligibility Requirements

Eligible households must:

- include a pregnant member, **or** a child under age 18 **or** a child age 18 who is in high school full time **and**
- be at or below 200% of poverty income requirements based on U.S. Department of Health and Human Services poverty guidelines. Recipients of Family Independence Program (FIP), Food Assistance Program (FAP), Medicaid (MA), and Child Development and Care (CDC) meet these income eligibility criteria and are considered automatically income eligible for TANF services.

See CSPM Item 901, Household Composition and Income Eligibility Guidelines, for household composition requirements, automatic income eligibility, and definitions of income. See CSPM Item 208 for current poverty guidelines.

Coordination

CAAs are encouraged to work with their community partners in identifying needs that can be addressed using these funds.

Cost Category Limitations

Administration

Allowable administrative costs include costs necessary for the proper administration of the program. Examples of administrative costs include:

- Salaries and benefits of staff performing administrative and coordination functions;
- Activities related to eligibility determination;
- Preparation of program plans, budgets and schedules;
- Services related to accounting, litigation, audits, management of property, payroll and personnel.

Administrative expenses may not exceed 15% of the CAA's allocation.

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Community Services Policy Manual	SUBJECT Allocation and Program Requirements TEMPORARY ASSISTANCE FOR NEEDY FAMILIES FUNDS		EFFECTIVE DATE 10-01-07 ISSUE DATE 11-16-07

Billing and Financial Reporting

Report monthly expenditures on the DHS-3470, Statement of Expenditures.

Submit one original and two copies of the DHS-3470, no later than 30 days after the report month, to:

Bureau of Community Action and Economic Opportunity
 Department of Human Services
 PO Box 30037
 Grand Tower, Suite 1314
 Lansing, MI 48909

ALLOWABLE ACTIVITIES

Allowable activities include:

- Non-recurrent, short-term benefits, which:
 1. are designed to deal with a specific crisis situation of need;
 2. are not intended to meet recurrent or ongoing needs; and
 3. will not extend beyond four months;
- Supportive services, such as child care and transportation, provided to families who are employed;

Note: “*Employed*” means a member of the family:

- Is receiving compensation for services performed; or
- Received compensation for services performed within the last 90 days; or
- Has a specific job offer.

Note: TANF funds should be used for child care ONLY if the family is NOT eligible for this service through DHS. Payments for child care services may only be made to child care providers that are licensed or registered by the Department of Human Services, Bureau of Children and Adult Licensing.

- Other services, such as counseling, case management, peer support, child care information and referral, and transitional services, that do not provide basic income support.

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Community Services Policy Manual	SUBJECT Allocation and Program Requirements TEMPORARY ASSISTANCE FOR NEEDY FAMILIES FUNDS		EFFECTIVE DATE 10-01-07 ISSUE DATE 11-16-07

UNALLOWABLE ACTIVITIES

Unallowable activities include:

- The purchase or improvement of land;
- The purchase, construction, or permanent improvement of any building or other facility;
- Cash, payments, vouchers, and other forms of benefits designed to meet a family's ongoing basic needs (i.e., food, clothing, shelter, housing subsidies, utilities, household goods, personal care items and general incidental expenses);
- Medical services;

Note: Medical services are services provided for the purpose of diagnosing, treating or preventing disease. Disease refers to any condition of physical or mental ill health, regardless of the cause. Typically, medical services include those services covered by the Medicaid program or other health insurance plans, or provided by Michigan Department of Community Health.

Exception: TANF funds may be used to cover medical/dental services not billable to Medicaid.

- Ongoing child care, transportation and supports for families that are not employed;
- Car purchase and repair: TANF cannot be used to supplement the limits for auto repair (\$900 in a 12-month period) or auto purchase (\$1,200 lifetime) for FIP and employed FAP, MA and CDC families who are eligible for this service through DHS or the Michigan Works Agency (MWA).

Exception: TANF may only be used to purchase or repair cars for clients who are not eligible for this service from DHS or MWA.

SERVICE PLAN INSTRUCTIONS

The CAA shall prepare and submit a service plan in accordance with the following instructions. Submit an electronic copy of the plan to your grant manager. **The submittal due date is Friday, November 30, 2007.**

The FY08 program service plan must include the following elements:

- A completed Plan Request – (Attachment A)
- A completed Plan Narrative (Attachment B)

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- Contract Budget (CM-469ex-Attachment C)
- Staff Respondents Form – (Attachment D)

Plan Narrative – Attachment B

Provide a detailed description for each activity and/or service for which you will use TANF funding. Use the following outline for each activity or service:

- Project/Activity name
- The need that is being addressed
- A description of the activity and its main objectives: Be specific and identify what services will be provided to what population; e.g., FIP, Work First, etc.
- The project period
- The target population: Include how the clients will be referred or how they will be identified for the specific project/activity; e.g., clients seeking emergency assistance for utility services, clients referred by another human service agency, clients referred by utility company, clients currently involved in a specific agency program, etc.
- Service center(s): Identify and include the service center(s) address(es).
- Coordination: Identify the other agencies or groups that will be involved and how they will participate.

Also describe any other activities conducted by your agency that **are not supported by this funding** but are specifically connected as part of the overall scope of the project.

FY 2008 TEMPORARY ASSISTANCE TO NEEDY FAMILIES (TANF) GRANT	
(Initial Planning Allocations)	
Effective: October 1, 2007 through September 30, 2008	
AGENCY	TOTAL CONTRACT ALLOCATION
Detroit- Department of Human Services	\$ 497,928
Wayne Metro Community Action Agency	\$ 197,688
Oakland-Livingston Human Service Agency	\$ 159,880
Genesee County Community Action Resource Department	\$ 124,296
Area Community Service Employment & Training Council (ACSET) -CAA	\$ 117,624
Capital Area Community Services	\$ 117,624
Macomb County Community Service Agency	\$ 104,280
Mid-Michigan Community Action Agency	\$ 84,264
Southwest Michigan Community Action Agency	\$ 79,816
Community Action Agency of South Central Michigan	\$ 70,920
Washtenaw County Employment & Training & Community Services Group	\$ 70,920
Saginaw County Community Action Committee	\$ 64,248
Eight CAP, Inc.	\$ 62,024
Kalamazoo County Human Development Bureau	\$ 62,024
Community Action Agency of Jackson, Lenawee, Hillsdale	\$ 59,800
Northeast Michigan Community Service Agency	\$ 59,800
Northwest Michigan Human Services Agency	\$ 59,800
Muskegon-Oceana Community Action Against Poverty	\$ 55,352
Human Development Commission	\$ 46,456
Economic Opportunity of St. Clair County	\$ 33,112
Five CAP, Inc.	\$ 33,112
Ottawa County Community Action Agency	\$ 33,112
Monroe County Opportunity Program	\$ 26,440
Twenty-three (23) agencies for review- TOTAL	\$ 2,220,520

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Community Services Policy Manual	SUBJECT: Allocations and Program Requirements MICHIGAN PUBLIC SERVICE COMMISSION (MPSC) ASSISTANCE FUNDS		EFFECTIVE DATE 10/01/07 ISSUE DATE 09/14/07

PURPOSE:

To provide Community Action Agencies (CAAs) and Limited Purpose Agencies (LPAs) with instructions regarding administration of Michigan Public Service Commission (MPSC) weatherization/client education funds.

BACKGROUND:

When the State of Michigan, Department of Human Services (DHS), receives funding from the MPSC for Low-Income Energy Efficiency Weatherization activities, a portion of these funds are allocated to CAA/LPAs to enable them to provide weatherization/client education assistance to low-income households. The use of these funds should be coordinated with other weatherization/client education program funding sources.

POLICY:

ALLOCATION OF FUNDS

Funds are allocated using the U. S. Department of Energy (DOE) allocation formula.

AGREEMENT INSTRUCTIONS

The MPSC Agreement must be signed by the person having lawful authority to bind the Grantee to its terms. The signature must be witnessed. Both originals of the signed, dated and witnessed Agreement must be returned to the DHS grant manager at:

Department of Human Services
Bureau of Community Action and Economic Opportunity
PO Box 30037
Grand Tower, Suite 1314
Lansing, MI 48909

The MPSC Agreement, in conjunction with the Master Agreement, will constitute the full contractual agreement between DHS and the CAA/LPA for administration of MPSC funds.

ELIGIBILITY REQUIREMENTS

Eligible households must meet 200% of poverty income requirements based on U.S. Department of Health and Human Services (HHS) poverty guidelines. See

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CSPM Item 208, Poverty Income Guidelines, for poverty guidelines and Item 1003, Income Eligibility Guidelines, for definitions of income.

AUTOMATIC INCOME ELIGIBILITY

Weatherization

A household is automatically income-eligible for MPSC weatherization program services if a household member has received Family Independence Program (FIP), Supplemental Security Income (SSI), or State Disability Assistance (SDA) benefits at any time during the twelve month period previous to the application date.

Client Education

Clients are automatically income-eligible for MPSC client education services in the following instances:

- The client's household has been determined eligible for DOE, Low Income Home Energy Assistance Program (LIHEAP), or MPSC weatherization assistance within the previous 12 month period.
- The client's household has received emergency energy assistance from the agency or State Emergency Relief (SER) assistance from DHS within the previous 30-day period.
- A member of the client's household currently receives FIP, SSI, or SDA.
- The client's household currently receives any other form of agency or public assistance with an income threshold at or below 200% of federal poverty level. Proof of the client's receipt of such assistance and verification of the corresponding income threshold must be obtained.

The agency must include documentation supporting the automatic income eligibility in the client file.

COORDINATION

The use of MPSC funds should be coordinated with all other weatherization/client education program funds available.

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ALLOWABLE ACTIVITIES

Weatherization

Local Weather Operators (LWOs) are required to administer this Agreement following DOE Weatherization Assistance Program (WAP) regulations and HHS LIHEAP regulations. The Community Services Policy Manual will prevail when the manual has policy that contains requirements different from DOE and/or LIHEAP regulations.

MPSC funds may be used for:

- Weatherization services to households with incomes at or below 200% of federal poverty level.
- Weatherization services to low-income multi-unit dwellings upon DHS review and approval of energy audit and proposed measures.
- Installation of additional weatherization measures that expand on those currently funded under DOE/LIHEAP weatherization to high energy use homes identified by multi-disciplinary teams through the Energy Direct program.
- Installation of additional measures that are allowed and/or recommended by the DOE program, but have not been sufficiently funded by the DOE or LIHEAP programs. This will include a particular emphasis on measures which save electricity and heating fuel.
- Installation of weatherization measures for special collaborative weatherization projects for low-income households upon DHS approval.
- Installation of weatherization measures required to preserve the effectiveness of other energy saving measures installed.
- Installation of additional weatherization measures for low-income households as approved by DHS.

Client Education

Allowable client education activities include:

- Client education classes that include information on energy conservation and bill management for emergency energy assistance recipients and those weatherization recipients not able to be served under current LIHEAP energy education guidelines.
- Client utility vouchers to be used as incentives for successful completion of client education activities.

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- Energy saving kits for distribution to low-income households that include items such as compact florescent bulbs, low-flow showerheads, carbon monoxide detectors, caulk, and other measures easily installed by members of the household.
- Energy education materials targeted toward youth and adults for distribution to low-income households during the weatherization process, formal classes, community and school events, or in other forums that target low-income families.
- Youth energy education classes and other instructional opportunities for students and teachers in Head Start.
- Energy education packets for distribution to recipients of other low-income programs in the community.
- Additional energy education activities for low-income households as approved by DHS.
- Youth initiatives that partner with local schools, where each school is primarily low-income as determined by at least 60% of the students receiving a low-income program such as free or reduced lunch, or other methods as approved by DHS and the MPSC on a case by case basis.

BENEFIT MANAGEMENT

The Grantee may set a maximum amount for energy efficiency items and/or incentive payments to be provided per household.

SERVICE PLAN INSTRUCTIONS

The following forms must be submitted in the Local Service Plan:

- Plan Summary Narrative Form- Attachment B
- Electronic Budget

LWOs must prepare the MPSC Service Plan in accordance with the instructions and policy noted above. Plans must be submitted (postmarked) by the date specified by DHS.

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Community Services Policy Manual	SUBJECT: Allocations and Program Requirements MICHIGAN PUBLIC SERVICE COMMISSION (MPSC) ASSISTANCE FUNDS		EFFECTIVE DATE 10/01/07 ISSUE DATE 09/14/07

Submittal Instructions

Step 1: **Sign, witness and date** both copies of the Agreement.

Step 2: **Mail** the **two** signed Agreements to:

Department of Human Services
Bureau of Community Action and Economic Opportunity
 235 S. Grand Avenue, Suite 1314
 PO Box 30037
 Lansing, MI 48906

Step 3: **E-mail** the completed plan documents and electronic Budget to the DHS grant manager.

REPORTING REQUIREMENTS

Narrative and Programmatic Report

Each agency must complete, and submit electronically, the MPSC Narrative Report (DHS-440), the MPSC Weatherization Programmatic Report (DHS-441) and the MPSC Client Education Activities Programmatic Report (DHS-442). See CSPM Items 1002 and 1005 for reporting instructions.

Billing and Financial Reporting

Report monthly expenditures on the Statement of Expenditures (DHS-4326-MPSC).

Submit **one original** and **two** copies of the DHS-4326-MPSC no later than 30 days after the report month, to:

Department of Human Services
 Bureau of Community Action and Economic Opportunity
 PO Box 30037
 Grand Tower, Suite 1314
 Lansing, MI 48909

INITIAL PAYMENT

An advance of 20% will be processed for payment to the CAA/LPA upon completion of DHS processing of the MPSC Agreement and corresponding Notice of Funds Available (NFA). A copy of the signed Agreement will be returned to the CAA/LPA. Subsequent payments in response to the DHS-4326-MPSC will be reduced to recover the advance.

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INQUIRIES

In accordance with the Americans With Disabilities Act, the information contained in this document will be made available in alternative format (large type, audiotape, etc.) upon special request.

CSPM ITEM 310 - ATTACHMENT A					
	MPSC-08	20% Initial	10%	30%	20%
LWO	Allocation	Payment	Admin	Support	Client Ed
ACSET-CAA	\$497,354	\$99,471	\$49,735	\$149,206	\$99,471
ALLEGAN CO.	\$176,436	\$35,287	\$17,644	\$52,931	\$35,287
AMCAB	\$222,281	\$44,456	\$22,228	\$66,684	\$44,456
B-H-K CAA	\$222,281	\$44,456	\$22,228	\$66,684	\$44,456
C-L-M CAA HRA	\$205,610	\$41,122	\$20,561	\$61,683	\$41,122
CAA/S CENTRAL	\$437,616	\$87,523	\$43,762	\$131,285	\$87,523
CAPITAL AREA	\$559,870	\$111,974	\$55,987	\$167,961	\$111,974
CAAJLH	\$402,884	\$80,577	\$40,288	\$120,865	\$80,577
D-I CSA	\$204,221	\$40,844	\$20,422	\$61,266	\$40,844
DETROIT-DHS	\$2,365,904	\$473,181	\$236,590	\$709,771	\$473,181
DOWNRIVER CC	\$340,368	\$68,074	\$34,037	\$102,110	\$68,074
EOC-ST CLAIR CO.	\$250,066	\$50,013	\$25,007	\$75,020	\$50,013
EIGHT CAP	\$369,542	\$73,908	\$36,954	\$110,863	\$73,908
FIVECAP	\$280,630	\$56,126	\$28,063	\$84,189	\$56,126
G-O CAA	\$186,160	\$37,232	\$18,616	\$55,848	\$37,232
GENESEE CO CAR	\$623,776	\$124,755	\$62,378	\$187,133	\$124,755
HUMAN DEVELOP.	\$355,650	\$71,130	\$35,565	\$106,695	\$71,130
KALAMAZOO CO.	\$307,026	\$61,405	\$30,703	\$92,108	\$61,405
M-D-S CAA HRA	\$240,341	\$48,068	\$24,034	\$72,102	\$48,068
M-O CAAP	\$354,260	\$70,852	\$35,426	\$106,278	\$70,852
MACOMB	\$569,595	\$113,919	\$56,960	\$170,879	\$113,919
MID-MICH. CAA	\$537,642	\$107,528	\$53,764	\$161,293	\$107,528
MONROE CO. OP F	\$195,885	\$39,177	\$19,589	\$58,766	\$39,177
NEMCSA	\$465,401	\$93,080	\$46,540	\$139,620	\$93,080
NWMHSA	\$427,891	\$85,578	\$42,789	\$128,367	\$85,578
OLHSA	\$821,051	\$164,210	\$82,105	\$246,315	\$164,210
OTTAWA CO CAA	\$193,107	\$38,621	\$19,311	\$57,932	\$38,621
SAGINAW CO.	\$387,603	\$77,521	\$38,760	\$116,281	\$77,521
SOUTHWEST	\$468,179	\$93,636	\$46,818	\$140,454	\$93,636
WASHTENAW CO.	\$298,690	\$59,738	\$29,869	\$89,607	\$59,738
WAYNE CO.	\$522,360	\$104,472	\$52,236	\$156,708	\$104,472
WAYNE-METRO	\$402,884	\$80,577	\$40,288	\$120,865	\$80,577
TOTAL	\$13,892,565				

MPSC WEATHERIZATION & CLIENT EDUCATION PROGRAM SERVICE PLAN

MPSC PLAN SUMMARY NARRATIVE FORM- ITEM 310 - ATTACHMENT B

Contract No.

MPSC-08-

Agency Name

Agency Address:

Staff Respondent #1:

Staff Respondent #2:

Email:

Email:

Phone:

Phone:

SUMMARY NARRATIVE

SECTION I: Program Operations- Weatherization Activities

Indicate the number of units to be weatherized using MPSC funds: _____

Describe how the MPSC funds will be coordinated with other Wx funds:

Indicate whether or not units over 150% of poverty income will be weatherized?

Yes _____ No _____

If Yes to above, what percentage of total units projected will represent 150%-200% of poverty income?

Describe any additional energy savings measures for which you are requesting to use MPSC funds.

Indicate the dollar amount AND percentage of total MPSC allocation you will use for non-energy related measures (e.g. roof repairs/replacements)-

\$ _____ %

Note: If you are planning to use over 25% of your total MPSC allocation for non-energy related measures, you must submit a waiver request. Please complete the waiver request page attached and answer all questions.

MPSC WEATHERIZATION & CLIENT EDUCATION PROGRAM SERVICE PLAN

MPSC Wx Waiver Request

I am requesting a waiver to the 25% limit to installation of non-energy savings measures. I request to use: \$_____ representing _____% of AGENCY NAME's total allocation of: \$_____.

List below all non-energy savings measures planned, the planned cost and justification for each:

1.

2.

3.

4.

Client Education:

MPSC WEATHERIZATION & CLIENT EDUCATION PROGRAM SERVICE PLAN

For any type of approved activity, e.g. client education courses, energy education kits to be provided, incentive payments, etc., describe:

- Which activities will be done:

- The anticipated number of households to be served:

If you are planning to distribute energy education kits, please indicate the number of kits planned:

Please list the items to be included in the kits:

If you are planning to distribute energy savings items individually, please list the items that will be distributed:

Indicate whether vouchers/incentive payments will be provided: _____ Yes _____ No

If yes to above, indicate the number of vouchers/incentive payments planned and the amounts:

Describe any special projects you are requesting.

MPSC Projected Unit Production:

MPSC WEATHERIZATION & CLIENT EDUCATION PROGRAM SERVICE PLAN

Indicate in the spaces below the projected units to be weatherized by month and PYTD:

10/07	11/07	12/07	01/08	02/08	03/08	04/08	05/08	06/08	07/08	08/08	PYTD

Indicate in the spaces below the projected number of households to receive client education by month and PYTD:

10/07	11/07	12/07	01/08	02/08	03/08	04/08	05/08	06/08	07/08	08/08	PYTD

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Community Services Policy Manual	SUBJECT Allocations and Plan Instructions: COMMUNITY SERVICES BLOCK GRANT Discretionary Funds: EITC Outreach and Income Tax Return Preparation Assistance		EFFECTIVE DATE 01/01/07 END DATE 06/30/07 ISSUE DATE 12/08/06

REFERENCES

- The CSBG Act, P.L. 97-35 of 1981, as amended by the Coats Human Services Reauthorization Act of 1998.
- CSPM Item 402.1 – Program Accounts & Cost Categories for CSBG

BACKGROUND

The Department of Human Services (DHS) is allocating \$283,500 in FY2007 CSBG-Discretionary funds (CSBG-T contracts) to CAAs for EITC (Earned Income Tax Credit) Outreach and free Income Tax Return Preparation Assistance for the calendar year ending December 31, 2006.

PURPOSE

This item provides guidelines and instructions for preparation and submittal of a plan for EITC Outreach and Tax Return Preparation Assistance activities to be supported with state CSBG-T funds.

POLICY

Funding Period:

The contract funding period will be January 1, 2007 through June 30, 2007. All unexpended funds will lapse at the end of the funding period.

Funding Allocations:

Agency allocations are based on the CAA survey responses to the communication/survey dated December 4, 2006. No allocation exceeds \$10,000. [See Attachment A]

Funded Activity:

Funds will be utilized to enhance or facilitate the Grantee's ability to provide free Tax Return Preparation Assistance and/or to promote EITC filing by low-income Michigan citizens.

Client Service Eligibility:

Individuals or households that are eligible for any service being provided by the Grantee will be eligible for free income tax preparation assistance services.

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SERVICE PLAN INSTRUCTIONS

The CAA shall prepare and submit a service plan in accordance with the following instructions and must include:

- A completed Plan Request (DHS-1058 12/05) [Attachment B]
- A completed Work Statement [Attachment C]
- A Contract Budget (CM-469ex adapted for CSBG-T contracts 12/06) [Attachment D]
- A Staff Respondents Form [Attachment E]

Note: All forms will be forwarded to you electronically via e-mail.

CSBG-T Work Statement:

Please be concise, the activities described in the Work Statement must support the costs identified in the Budget.

Contract Budget:

The one-page Budget (form CM-469 adapted for CSBG-T Contracts) must be used for this contract. Since your planning time for submittal of this budget is short, we recommend that you concentrate your dollars under as few line items as possible. This will make it easier to get the budgets reviewed and approved by DHS.

- Expenditures included in the budget must be allowable under CSBG and all costs must be pertinent to the intended service. For the Line Item Definitions, and a description of Allowable Costs and Unallowable Costs, please refer to CSPM Item 402.1 – Program Accounts & Cost Categories for CSBG. **Note:** Please show the Total Cost for each Line Item in the “DHS Contract Budget” column. Multiple costs under the same Line Item should be included in the “Line Item Description” column.
- ADMIN costs are limited to 15% of the contract amount. ADMIN costs are restricted to wages and fringes for central administrative staff and for prorated costs associated with the single agency audit.
 1. Wage and Fringe costs: Administrative staff are defined as staff who administer and manage the central office and centralized functions of the agency. Note: If you have Admin staff that will be working within the project in a Non-Admin role, you will need to list the position(s) with its dual titles when budgeting these costs as Non-Admin. For Example: Fiscal Director/Tax Prep. For Example: Account Clerk/Tax Prep.
 2. Prorated audit costs should be budgeted under the Consultant/Professional Services line item.

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3. Indirect Costs: All mathematical calculations supporting the cost must be included in the budget. (Example: Indirect Rate of 6.3% $\$15,000 / 1.063 = \9202 $\$9202 \times .063 = \579 Indirect Costs.) A copy of the latest approved Indirect Cost Rate Agreement must be submitted with the CAA signed contract agreement or faxed to your grant manager.
- Direct Program costs budgeted for the **purchase of computers or printers** are limited as follows: Computer – maximum cost of \$1500, Printer – maximum cost of \$200. The need for these items must be addressed in the Work Statement.
 - **E-Filing** fees are considered Direct Program costs. Note: *E-filing* fees (example: through TaxWise – Universal Tax Systems, Inc.), should be identified under the Communication line item. Note: Agencies that have been designated by the IRS as a VITA or a TCE will not be charged *E-filing* fees from those designated sites.

PLAN DUE DATE:

SPECIAL SUBMITTAL INSTRUCTIONS

1. Sign and witness both copies of the Grant Agreement. Grant Agreements need to be signed by the CAA no later than **January 4, 2007** (this will guarantee a January 1, 2007 begin date).
2. **Mail** the two signed Agreements to:

[Note: You need to include the Bureau's name in the address or the package may be delivered to the wrong office]	Department of Human Services Bureau of CAEO 235 S. Grand Avenue, Suite 1314 PO Box 30037 Lansing, MI 48906
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3. **Send, via Email**, your completed CSBG-T plan (Attachments B, C, D and E) to your grant manager by Friday, **January 4, 2007**. No mailed copy is necessary.
4. If applicable to your agency, Mail or fax your Indirect Cost Rate Agreement to your grant manager.

INQUIRIES:

Questions regarding the Planning Guidelines should be directed to your grant manager. The main number for the Bureau of CAEO is (517) 373-8896.

Attachments: A – CSBG-T Allocation Chart
 B – Plan Request Form
 C – CSBG-T Work Statement

D – CSBG-T Contract Budget
 E – Staff Respondents Form